

## EXHIBIT 3-E

### SAMPLE SELECTION CRITERIA FOR EVALUATING CONSULTANT PROPOSALS Offered in response to RFPs or RFQs

**CONSULTANT / FIRM:** \_\_\_\_\_

**1. The Qualifications of the Professional Personnel to be Assigned to the Project**

- a. Who will do the actual work on the engineering design [or, as applicable, architectural design] and supervise construction? Does the staff to be assigned to the project on a day-to-day basis have technical training and experience appropriate to the scope of work in the RFP?

Comments:

- b. Does the firm use subcontractors for certain work? If so, which firms and for what work? Comments:

- c. Are the reference checks supportive of the consultant's technical abilities and ability to work cooperatively with local officials?

Comments:

- d. What experience does the firm have in working with State and Federal environmental and funding agencies?

Comments:

Score for qualifications of the professional personnel to be assigned to the project:

- \_\_\_\_ Best (\_\_\_ points)  
\_\_\_\_ Above average (\_\_\_ points)  
\_\_\_\_ Average (\_\_\_ points)  
\_\_\_\_ Below average (\_\_\_ points)  
\_\_\_\_ Poor (\_\_\_ points)

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**2. The Consultant's Capability to Meet Time and Project Budget Requirements**

- a. Has the consultant provided a step-by-step timetable for the work with milestones indicating when key tasks will be performed and by whom? Does the schedule appear complete and realistic?

Comments:

- b. To what extent will qualified staff be available to supervise project staff on-site?

Comments:

- c. How much time would the firm's staff actually spend in the community on a day-to-day basis over the term of the project?

Comments:

- d. Is the consultant capable of meeting the time and budget requirements for the project? What time schedule does the firm propose for completing the work?

Comments:

Score for consultant's capability to meet time and project budget requirements:

- ☐ Best (\_\_\_ points)
  - ☐ Above average (\_\_\_ points)
  - ☐ Average (\_\_\_ points)
  - ☐ Below average (\_\_\_ points)
  - ☐ Poor (\_\_\_ points)
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**3. Location**

- a. Where is the firm located?

Comments:

Score for location:

- ☐ Best (\_\_\_ points)
  - ☐ Above average (\_\_\_ points)
  - ☐ Average (\_\_\_ points)
  - ☐ Below average (\_\_\_ points)
  - ☐ Poor (\_\_\_ points)
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**4. Present and Projected Workloads**

- a. What is the current and projected workload of the consultant and how much time will the consultant have available to devote to the project?

Comments:

- b. What projects are the firm now working on and what new ones may be starting soon?

Comments:

Score for present and projected workloads:

- ☐ Best (\_\_\_ points)
  - ☐ Above average (\_\_\_ points)
  - ☐ Average (\_\_\_ points)
  - ☐ Below average (\_\_\_ points)
  - ☐ Poor (\_\_\_ points)
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**5. Related Experience on Similar Projects**

- a. Does the consultant have experience with similar projects for similar sized communities? Which communities have they worked with in the recent past?

Comments:

- b. Does the firm have experience in designing similar systems for similar sized communities? What types of systems has the firm actually recommended, designed and installed? When were they installed? How are these systems working? What were the estimated costs? What are the present operation and maintenance costs of these systems?

Comments:

- c. How do previous clients rate the consultant's performance (i.e. reference checks)? What is the consultant's track record on similar projects for timely performance within original budgets?

Comments:

Score for related experience on similar projects:

- ☐ Best (\_\_\_ points)  
☐ Above average (\_\_\_ points)  
☐ Average (\_\_\_ points)  
☐ Below average (\_\_\_ points)  
☐ Poor (\_\_\_ points)

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**6. Recent and Current Work for the Entity Issuing the RFP/RFQ**

- a. If the consultant has done work previously for the community, how did they perform?

Comments:

Score for recent and current work for the entity issuing the RFP/RFQ:

- ☐ Best (\_\_\_ points)  
☐ Above average (\_\_\_ points)  
☐ Average (\_\_\_ points)  
☐ Below average (\_\_\_ points)  
☐ Poor (\_\_\_ points)

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**NOTE: In addition to the selection criteria listed above, another more general evaluation criterion -- one that is concerned with the overall quality of the proposal -- could potentially be added.**

**7. Quality of the Proposal**

- a. Does the proposal respond comprehensively to the tasks outlined in the request for proposals (RFP) or request for qualifications (RFQ)?

Comments:

- b. Does the proposal reflect a good understanding of the technical issues involved in the project?

Comments:

- c. Does the proposal indicate an understanding of the requirements that must be complied with for a TSEP project (and the other state and/or federal funding sources

involved)? What experience has the firm had dealing with state or federal grant or loan programs? What experience has the firm had with lending institutions or financial consultants? What experience has the firm had helping communities get financing from commercial sources (banks, bond sales)?

Comments:

- d. Has the consultant provided a clear description of how the work will be managed and how the consultant will coordinate with local officials and staff? How does the firm plan to handle public participation in this project?

Comments:

Score for quality of proposal:

- \_\_\_\_ Best (\_\_ points)  
\_\_\_\_ Above average (\_\_ points)  
\_\_\_\_ Average (\_\_ points)  
\_\_\_\_ Below average (\_\_ points)  
\_\_\_\_ Poor (\_\_ points)

TOTAL NUMBER OF POINTS: \_\_\_\_\_

DATE: \_\_\_\_\_

SIGNATURE OF REVIEWER: \_\_\_\_\_

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**Note:**

The above factors and questions under them are only examples which are designed to fulfill federal requirements, as well as Montana's law regarding procurement of engineering, architectural, or surveying services. You may want to adapt your RFP/RFQ, including your evaluation factors and system for awarding points, to the key issues involved in your project and the type of assistance you are seeking.

If you modify the sample factors or questions, please keep in mind that Montana law (Section 18-8-204, MCA, found at <http://data.opi.mt.gov/bills/mca/18/8/18-8-204.htm>) sets out minimum criteria that should be considered for selection of architects, engineers, or surveyors.

The factors involved in reviewing responses to an RFP for grant management services may be different from those involved in an RFQ for engineering services or architectural services.